



State Employer Business Rules for BAM



Agenda

- Using the CalPERS Website
- Membership
- Account Codes
- Benefits
- Working after Retirement
- Resources



Active Members

Retirees

Employers

my | CalPERS Log In

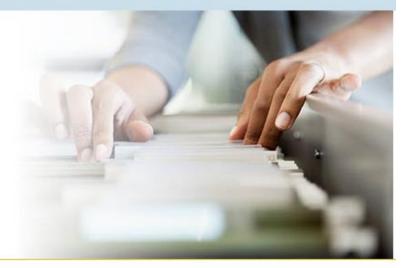
Actuarial Services | Benefit Programs | Contracts | my|CalPERS Technical Requirements | Policies & Procedures

Employers

Public Agency Actuarial Valuation Reports

Browse actuarial reports for public agency employers by CalPERS ID, name, type, or county.

View Reports





Want To ...

Attend Training & Events

Find my | CalPERS Student Guides

Learn About CalPERS Contracts

Read About Pension Reform

Review Policies & Procedures

View Employer Contributions

Search Actuarial Reports



Resources



CERBT

Circular Letters

GASB

Health Plans Codes

my | CalPERS Employer Reports (Cognos)

Social Security & Medicare



Forms & Publications

CalPERS Employer News (PDF)

Declaration of Health Coverage (HBD-12A) (PDF)

Health Benefit Plan Enrollment (HBD-12) (PDF)

my|CalPERS System Access Administration & Establishing a Business Partner Relationship (PDF, 1.28 MB)

Public Agency & Schools Reference Guide (PDF, 1.57 MB)

State Reference Guide (PDF, 1.21 MB)



Home

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Home > Email Subscriptions

Email Subscriptions

- All Board Meeting Notices and Agenda Alerts Access Board meeting notices and agendas as soon as they are available.
- · Ambassador Program Newsflash Know the best practices for communicating the facts about pensions.
- CalPERS Legislative News Receive updates on CalPERS policy issues and actions.
- CalPERS Long-Term Care Program Alert Stay up-to-date with Long-Term Care Program news and updates.
- CalPERS News Get updates on important issues and events as the news happens.
- Employer Bulletin Get customized employer news, Circular Letters, and event updates.
- Member Education Bulletin Learn when our member education events, webinars, and instructor-led classes will be held.
- State Social Security Administrator Program Newsletter Learn about Social Security and Medicare coverage for state and local government employees.

Subscribe to our newsletters and alerts

To get started, enter your email address below and select Subscribe. You'll choose or change your subscriptions on the next page.

Email Address

John.Q@CalHR.CA.GOV

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Contact

Customer Satisfaction Survey

Ethics Helpline

Headquarters & Regional Offices

Organization Directory

Public Records Requests

Questions, Comments, & Complaints

Tours & Speakers

Want to Reach Us?

Hours: Monday - Friday, 8:00 a.m. to 5:00 p.m.

We're closed on state holidays.

Phone: 888 CalPERS (or 888-225-7377)

TTY: (877) 249-7442 Fax: (800) 959-6545

International Calls: +1 916-795-3000





System Access Administrator (SAA)

SAA responsibilities

- Managing access roles for staff
- Main point of contact for your agency
- Maintaining accounts



System Access Administrator

New Contact Checklist

 Meant to aid employers with SAA responsibilities

User Access Exit Checklist

- Deactivate contacts
- Reactivate a user account
- Locking and unlocking
- Deleting accounts





Welcome **Employer News**

For Direct Authorization Vendors, Health Plan Business Partners, and Dental **Plan Carriers:**

- 2017 Important Dates for Direct Authorization Vendors (PDF)
- Direct Authorization Vendor User Guide (PDF, 4.43 MB)
- my/CalPERS Enhancements Presentation (PPT, 3.65 MB)

Cognos Reports

- Visit my|CalPERS Employer Reports (Cognos) to view the updated list of available reports.
- View my|CalPERS Cognos Reports Browser Requirements (PDF) to ensure your browser is properly configured.
- . View my|CalPERS Course 205: So You Want to Run a Cognos Report? (PDF) for instructions on how to generate reports.



















Welcome to IBM Cognos Analytics

Get started by opening a dashboard, report or story!

Recent





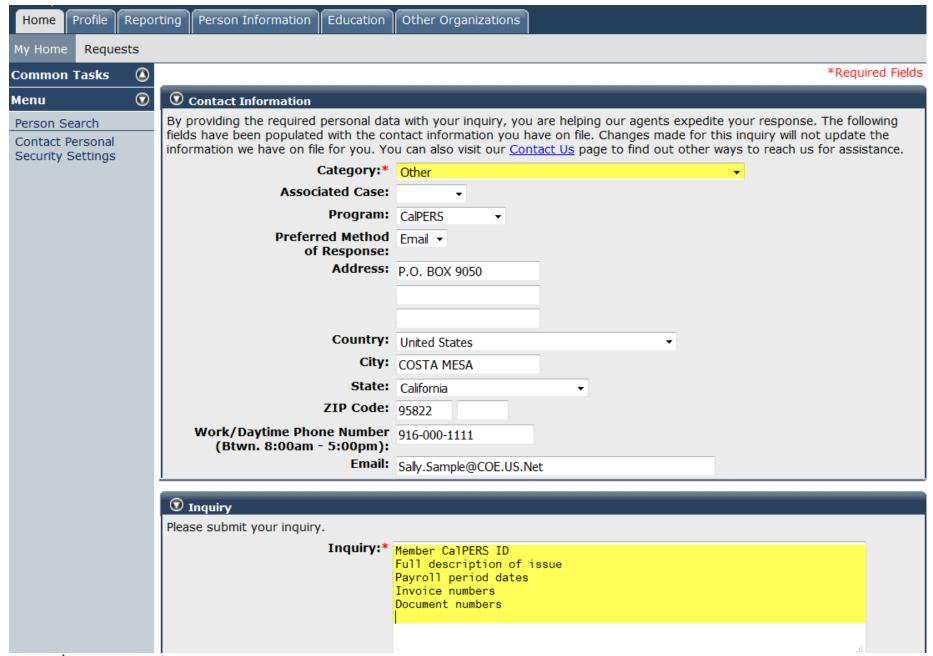
Drag and drop your files or browse



Document History

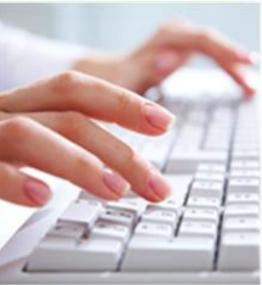
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Begin Date:								
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Search Clear								
Search Results								
To change the customer and Case of a document, select the document and click "Association." To override an In Progress document, select the document to override and click "Override Draft." To remove an In Progress document, select document and click "Remove Draft." To re-distribute a previously generated or distributed document, select the document and click "Redistribute Document." Association Override Draft Remove Draft Redistribute Document								
Document Numb	er <u>Document Name</u>		<u>Date</u>	Date Received	Source	<u>Status</u>	Document Detail	Print Locally
O my CalPERS 0926 93228920 - 1 p.	First Payment Acknowledgemen Employers	nt Letter for	07/21/2016	N/A	Outgoing	Distributed	<u>View</u>	Print Locally
O my CalPERS 0926 93184242 - 1 p.	First Payment Acknowledgemen Employers	nt Letter for	07/18/2016	N/A	Outgoing	Distributed	<u>View</u>	Print Locally
O my CalPERS 0926 93183675 - 1 p.	First Payment Acknowledgemen Employers	nt Letter for	07/18/2016	N/A	Outgoing	Distributed	<u>View</u>	Print Locally
O my CalPERS 0926 93183163 - 1 p.	First Payment Acknowledgemen Employers	nt Letter for	07/18/2016	N/A	Outgoing	Distributed	<u>View</u>	Print Locally
O my CalPERS 2288 93168759 - 2 pp.	Admin Fee - Arrears-Employer F	Paid (20283)	07/15/2016	N/A	Outgoing	Distributed	<u>View</u>	Print Locally
O my CalPERS 2235 93168758 - 2 pp.	Public Agency Adjustment Invoi	ice	07/15/2016	N/A	Outgoing	Distributed	<u>View</u>	Print Locally







Membership Qualifications







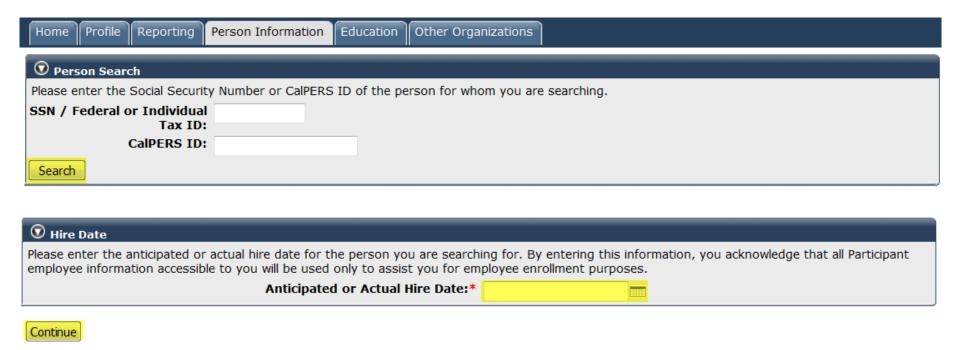
Identifying membership status

Three methods of checking membership

- 1. PIMS
- 2. my|CalPERS Person Information
- 3. Customer Contact Center
 - **888 CalPERS (**or **888-**225-7377)
- 4. Membership Unit Services Team
 - Membership_Reporting@calpers.ca.gov



Person search





Person search





Identifying membership eligibility

Immediate membership required on date of hire

- Permanent full-time
- Part-time, 20 hours, one year or longer
- Temporary full-time, excess of 6 months



Identifying membership eligibility

Irregular time base – monitored positions

- Temporary agencies
- On-Call
- Seasonal
- Intermittent
- Part-time, less than 20 hours a week



Optional Membership — G.C. 20320 - 20324

- Government code provides "optional" membership rights for elected and appointed officers of the state.
- Optional members are excluded unless an election for membership is filed with CalPERS.
- Four eligible classes:
 - 1. State Officers Elected by the People (my|CalPERS 0841)
 - 2. Appointees of State Officers (my|CalPERS 0842)
 - 3. Officers of the Senate or Assembly (my|CalPERS 0841)
 - 4. Legislative (my|CalPERS 0840)



Identifying membership eligibility

Excluded Membership – Government Code (G.C.) 20300

- Independent Contractors / Consultants / Contract Employees
- Excluded by law



Excluded Membership - G.C. 20300 - 20303

- Members of other retirement system for the same position
- Health & Welfare or Trade Rate employment
- Independent contractors
- Inmates of state institutions
- Student aides in the special schools of State Department of Education
- California Conservation Corps participants



Documenting

- Notice of Exclusion
- Member Reciprocal Self-Certification



Notice of Exclusion

Offered to all who do not qualify

Provides specific reason for exclusion

Collect signature and provide copy to employee

Save document in employee file



Notice of Exclusion Form - PERS AESD 139S



NOTICE OF EXCLUSION FROM CaIPERS MEMBERSHIP FOR STATE AGENCIES

1. SOCIAL SECURITY NUMBER 000-11-2222		Your employer is legislatively mandated to provide an employee benefit package which includes service retirement, death, and disability benefits through the California Public Employees' Retirement System.								
2.	CURRE	ENT NAME	(LAST)	(MIDI	(MIDDLE) (FIRST)					
	Sample			Q			Sally			
NAME OF DEPARTMENT			TV				4. JOB OR POSITION T			
XXX							Analyst I			
5.	5. TERM OF APPOINTMENT			IF TEMPORARY, ENTER NEAREST NUMBER OF WHOLE MONTHS THE APPOINTMENT IS			7. APPOINTMENT DATE			
_		_			EXPECTED TO LAST.	NI IS	MM	DD	YYYY	
PERMANENT TEMPORARY			PORARY	MONTHS						
8. TIME BASE FULL-TIME INDETERMINATE PART-TIME IF PART TIME, ENTER THE FRACTION OF FULL TIME:										
In your present position with this agency, you are excluded from CalPERS membership because:										
	1.	1. Your full-time seasonal or limited term appointment is limited to 6 months or less.								
	2.	2. Your part-time appointment is limited to less than an average of 20 hours per week for less than one year.								
	3.	Your appointment is an on-call, intermittent, emergency, substitute, or other irregular basis which excludes you from membership until you have worked 1,000 hours (or 125 days if paid on per diem basis) this fiscal year.								
	4.	4. Your position is excluded by law.								
_		5. You are an independent contractor (Personal Services Contract).								



Enrollment Level – Public Employee Pension Reform Act (PEPRA)

Definition of a New Member – G.C. 7522.04

- No prior membership in any CA public retirement system prior to 1/1/2013
- Moved between public retirement systems after 1/1/2013 and not eligible for reciprocity
- Break in service greater than six months

All State departments, including CSU, are considered the same employer



Identifying membership eligibility

Definition of a Classic Member – G.C. 7522.04

- Members that do not fit within the definition of "New Member" are considered "Classic Members"
- "Classic Members" will retain their existing retirement benefit formula(s)



Reciprocal Self-Certification

Offered to all new hires

Employee has 10 days

Determines benefit level

Does not establish reciprocity



Reciprocal Self-Certification Form EAMD-801

Complete the following information and return this form to your personnel office within 10 business days. To ensure this form is completed correctly, please reference the enclosed List of Qualifying Public Retirement Systems and instructions.

correctly, please rejerence the enclosed list of Qualifying rubble nethrene systems and instructions.								
Section 1. Member Information								
Member Name: (Last)	(First)	(Middle)						
Date of Birth:	CalPE	RS ID:						
Membership Status in Qualifying Public Retirement Systems:								
I have not been a member of a qualifying pu	blic retirement system in Ca	lifornia. (skip to section 3)						
I have membership in a defined benefit plan	under a qualifying public re	tirement system in Califor	nia other than CalPERS.					
(complete section 2 with membership information for each qualifying public retirement system)								
Section 2. Qualifying Reciprocal Membership Information								
Name of Most Recent Public Retirement System:	Membership Date:	Separation Date*:	☐ Retired* or ☐ Refunded*					
	/ /	/ /	Date: / /					
Name of Prior Public Retirement System:	Membership Date:	Separation Date*:						
Nume of Frior Fubic Retirement System.	/ /	/ /	Retired* or Refunded*					
	/ /	/ /	Date: / /					
Name of Prior Public Retirement System:	Membership Date:	Separation Date*:	☐ Retired* or ☐ Refunded*					
	/ /	/ /	Date: / /					
			butc. / /					

*Please provide dates, if applicable. Not all sections may be applicable for each Public Retirement System.



Enrolling/reporting membership - G.C. 20283

Timely enrollment of employees into CalPERS

- 90 day timeframe
- State and CSU appointments are added in PIMS
- my|CalPERS updates with appointment information from PIMS within 24 to 48 hours
- Not enrolled within 90 days then employer becomes responsible for member contributions and \$500 administrative cost



Maintaining member status changes

Demographic changes are input via PIMS

- Name
- Address
- Social Security number
- Birth date
- Gender



Maintaining member status changes

Please keep your employees accounts updated with

- Begin leave of absence
- End leave of absence
- Permanent separation



Membership Information

Does the employee qualify for CalPERS?

- If NO, then place the member into Part-time, Seasonal and Temporary (PST)
- If YES, then employee contributes into CalPERS



Account Codes







Personnel Action Request (PAR)

Information needed to determine account codes:

- Collective Bargaining Unit (CBU)
- Member Category
- Social Security
- Medicare
- Final Compensation period
- Concurrent Employment
- First tier or Second tier



Account Code Index

Personnel Action Manual - Section 2.62 Item 505

 Contact Personnel & Payroll Services Division Customer Contact Center (916)372-7200 if you need assistance



Benefits







Retirement Formulas – Miscellaneous

Classic

- 2.0% @ 55
- 2.0% @ 60
- 1.25% @ 65

New formula

- 2.0% @ 62
- 1.25% @ 67

Retirement Formulas – Safety

Classic

- 2.0% @ 55
- 2.5% @ 55
- 3.0% @ 50
- 3.0% @ 55
- 2.5% @ 55
- 2.5% @ 60

New formula

- 2.7% @ 57
- 2.5% @ 57
- 2.0% @ 57



State Benefit Provisions

Minimum provisions

- Military Leave of Absence
- Sick Leave Credit
- Retired Death Benefit \$2,000
- Pre-Retirement option 2W



Service Retirement Eligibility

First Tier members

- Age 50 for Classic and all Safety
- Age 52 Miscellaneous as of 01/01/2013
- 5 years of Earned Service Credit

Second Tier members

- Age 55
- 10 years of earned service credit



State Second Tier

Second Tier

- Election required
- 180 day election period
- Prospective election
- 3.75% contribution rate
- 1.25% @ 67



Service Retirement Calculation





Pension/Unmodified Allowance



Service Credit Earning Rates

Fiscal Year July 1 – June 30

• 10 Months full-time employment = 1 year of service credit

Pay type	Service credit earned
Monthly	1 month = one tenth (0.1)
Daily	215 days = 1 year
Hourly	1720 hours = 1 year



Common Service Credit Purchase Options

Redeposit of Withdrawn Contributions

Service Prior to Membership

Military Service

Leave of Absence



Benefit Factor

Determines the percentage of final compensation for years of service credit earned

- Based on contracted Retirement Formula
- Employee's age at retirement
- Employee's birthday quarters



Birthday Quarters

2^{percent}

2% at Age 62 Benefit Formula Minimum Age for Retirement 52 Membership Date on or After January 1, 2013					
Age	Exact Year	1/4 Year	1/2 Year	¾ Year	
52	1.000	1.025	1.050	1.075	
53	1.100	1.125	1.150	1.175	
54	1.200	1.225	1.250	1.275	
55	1.300	1.325	1.350	1.375	
56	1.400	1.425	1.450	1.475	
57	1.500	1.525	1.550	1.575	
58	1.600	1.625	1.650	1.675	
59	1.700	1.725	1.750	1.775	
60	1.800	1.825	1.850	1.875	
61	1.900	1.925	1.950	1.975	
62	2.000	2.025	2.050	2.075	
63	2.100	2.125	2.150	2.175	
64	2.200	2.225	2.250	2.275	
65	2.300	2.325	2.350	2.375	
66	2.400	2.425	2.450	2.475	
67 or older	2.500	2.500	2.500	2.500	



Final Compensation

- Based on employee's reportable compensation
- Not based on earnings
- The highest consecutive 12 or 36 month period
- Modified based on Social Security coordination

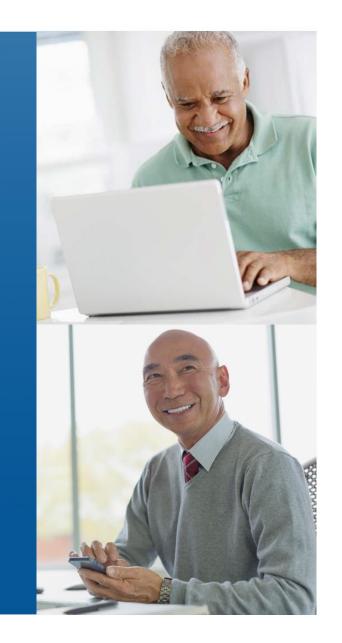


Service Retirement Calculation

Service Credit	X	Benefit Factor	X	Final Comp	=	Monthly Retirement
5	X	2.00 = 10%	X	\$5,000.00 - 133.33 \$4,866.67	=	\$486.66
					+	
20	X	2.00 = 40%	X	\$5,000.00	= Total	\$2,000.00 \$2,486.66



Working After Retirement





Retired Annuitant – G.C. 21220-21230

Eligibility wait periods

- Bona fide separation in service (G.C. 21220.5) & (CCR 586.2)
- Greater than 180 day break in service (G.C. 7522.56)

General requirements

- Retiree compensation
- Limited duration
- Retiree skills
- Extra Help



Retired Annuitant – G.C. 21220-21230

Reporting

- Enroll RA within 30 days or \$200.00 fee
- Must report payroll & hourly pay rate or \$200.00 fee
- No contributions, no service credit earned, no benefits, no vehicles
- Must not exceed 960 hours in a fiscal year, limited duration
- Independent Contractor (CalPERS retiree PEPRA)
- Circular Letter 200-002-14 (1-14-14)



Reinstatement from a Service Retirement

Employer Responsibility

- Provide firm start date
- Complete section 2
- Create new appointment
- Report payroll
- Pay employer contributions

Member Responsibility

- Complete section 1 and 3 on reinstatement application
- Send application to CalPERS



Resources







Additional Employee Support

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Pre-retirement Beneficiary

Special Power of Attorney

Call CalPERS Immediately

Report imminent death

Death of active member



Employer and Member Education

Employer Education

- Business Rules Training
- System Training
- Disability Training
- Educational Forum
 - Oakland
 - October 2019

Member Education

- CalPERS Benefits Education Events (CBEEs)
- Webinars
- Member Self-Service
- Regional Office
 - Retirement classes
 - New member classes
- Computer Based Training



Social Networking

- Follow us on Twitter: http://twitter.com/CalPERS
- Find us on Facebook: http://facebook.com/myCalPERS
- View videos on YouTube





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